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Agricultural Marketing Service

Poultry Programs

Market News Branch

Iraq: Agricultural Export Potential

Iraq was once a significant commercial market for U.S. farm products, with sales approaching \$1 billion in the 1980s. Prior to the sanctions, which were imposed in 1990, Iraq had been a major market for U.S. chicken leg quarters. Poultry shipments to Iraq peaked in 1987 when U.S. poultry exports were valued at \$58 million and egg and egg product exports were valued at \$6 million.

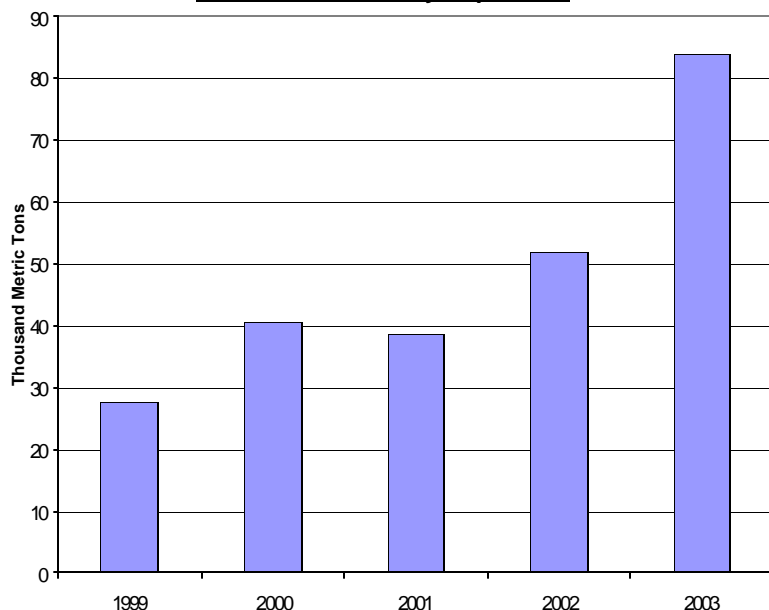
U.S. Agriculture Secretary Ann Veneman recently returned from a trip to Iraq and spoke to the National Association of Farm Broadcasters Annual Convention on November 14, 2003. Secretary Veneman noted a lot of poultry was used in the Iraqi diet and there had been a thriving poultry industry in the past. In some areas poultry is a very important segment of the agricultural economy. Secretary Veneman said Iraq can provide great opportunities for our farmers to provide feed grains to these poultry producers, since not many feed grains are produced in Iraq.

U.S. Poultry Export to Iraq, in metric tons

	Jul	Aug	Sep	YTD
Chicken Leg Quarters, Frozen				
HS 207140010	122.4	220.5	122.5	465.5
Chicken Other Leg, Frozen				
HS 207140025	0	24.5	0	24.5
Total	122.4	245	122.5	490

Source: USDA News Release, Department of Commerce, U.S. Census Bureau and news wires

U.S. Poultry Exports to the Middle East, in Metric Tons Year to Date, January-September



HS codes 0207

Source: Department of Commerce, U.S. Census Bureau

Philippines to Import Extra Chicken Meat

The Philippine government and local poultry producers have agreed to import one thousand metric tons of chicken meat to stabilize prices and ease the current supply shortage. The special import is a temporary measure to meet the increased chicken demand in December. The one thousand tons is equal to about three percent of the national demand. Demand is expected to ease in January after the holidays.

In July Typhoon Harurot destroyed a standing crop equivalent to 300,000 to 400,000 metric tons of corn which would have been harvested in the third quarter. It was the worst typhoon in the last five years. In Cagayan Valley, on the main island of Luzon, it is estimated that about half of the region's corn crop was destroyed. About 446,000 MT of corn crop was estimated to have been damaged by the typhoon. Integrators culled day old chicks and even breeders rather than import expensive feed.

The Department of Agriculture, the Philippine Association of Broiler Integrators (PABI) and the United Broiler Raisers Association, agreed to deploy rolling stores in some areas around Manila. Beginning November 21, the rolling stores will sell chicken meat at an average of 80 pesos per kilogram compared to the current market price of 95 to 100 pesos. In September, chicken cost 85 pesos per kilo.

Philippines Poultry Meat Production in '000 metric tons

	1996	1997	1998	1999	2000	2001	2002
Poultry	474	516	511	517	556	611	651

Source: FAOSTAT

U.S. Poultry Meat Exports to the Philippines in '000 dollars Fiscal Years (Oct-Sep)

	1997	1998	1999	2000	2001	2002	2003
Poultry	2,462	2,598	14,357	17,895	12,079	13,848	13,094

Source: USDA/FAS BICO report

2003 Monthly MAVICs* Issued (MT)

	Jan	Feb	Mar	Apr	May	Jun	Jul
Australia	10.9	14.3	19.0	-	13.8	-	-
Brazil	81.6	27.2	54.4	63.6	27.2	23.5	-
Canada	669.8	342.6	591.7	887.7	869.6	864.3	375.5
China	40.0	24.0	-	12.0	15.0	-	-
France	-	2.1	-	-	-	-	-
UK	-	-	-	-	-	-	21.0
USA	815.6	719.4	1,489.8	1,212.7	1,481.5	653.7	1,783.9

HS 0207 - Poultry Quarterly MAVICs* Issued (MT)

CY	MAV	Q1	Q2	Q3	Q4	Total	Used
2001	19,834	2,361	2,861	1,617	4,982	11,821	60%
2002	20,879	2,896	3,845	4,884	6,292	17,917	85.5%
2003	21,923	4,902	6,125	2,180	-	13,207	60.2%

*Minimum Access Volume Import Certificates

Sources: USDA/FAS, various news stories

Inspected Egg Products-U.S. & Canada Export/Import Trade**U.S. Exports to Canada, in Pounds (000) (Preliminary)**

	Week Ending November 08, 2003		Year-To-Date	
	2003	2002/1	2003	2002
Liquid	551	407	15,253	17,854
Frozen	0	0	96	21
Dried	0	0	479	763
Total	551	407	15,828	18,638

U.S. Imports From Canada, in Pounds (000) (Preliminary)

	Week Ending November 08, 2003		Year-To-Date	
	2003	2002/1	2003	2002
Liquid	114	138	5,178	5,619
Frozen	120	6	3,274	3,037
Dried	76	120	1,180	4,648
Total	310	264	9,632	13,304

Inspected Shell Eggs**U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

	Week Ending November 08, 2003		Year-To-Date	
	2003	2002 /1	2003	2002
Jumbo	33	83	437	1,390
Extra Large	1,601	2,900	29,503	41,977
Large	7,180	3,820	115,775	129,190
Medium	2,234	120	57,492	44,743
Ungraded	3,600	5,220	166,638	313,145
Misc	0	0	14,642	14,017
Total	14,648	12,143	384,487	544,462

Comparable Week, to-date figures may not total due to rounding.

Source: USDA/AMS Poultry Programs, Market News Branch in cooperation with Agriculture Canada, Poultry Development Division.

LIVE POULTRY SLTRD UNDER INSPECTION W/E 8-Nov-03

(PRELIMINARY)

U.S. FOWL SLAUGHTERED DOMESTICALLY

	LIGHT HENS	HEAVY HENS	TOTAL HENS
THOUSANDS			
HEAD	1,258	1,473	2,731
LAST WEEK	1,093	1,314	2,407
SAME WEEK YR AGO	1,438	1,548	2,986
TO-DATE/2003	64,968	63,093	128,061
TO-DATE/2002	78,796	63,839	142,635

	LIGHT HENS	HEAVY HENS	TOTAL HENS
THOUSANDS			
HEAD	0	0	0
LAST WEEK	172	0	172
SAME WEEK YR AGO	220	0	220
TO-DATE/2003	9,995	141	10,136
TO-DATE/2002	13,757	268	14,025

SOURCE: AGRICULTURE CANADA, PLTRY DEVELOPMENT DIV.

TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
HEAD	1,258	1,473	2,731
LAST WEEK	1,265	1,314	2,579
SAME WEEK YR AGO	1,658	1,548	3,206
TO-DATE/2003	74,963	63,234	138,197
TO-DATE/2002	92,553	64,107	156,660

SOURCE: USDA/AMS PLTRY PROGRAMS, MARKET NEWS BR.

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

14-NOV-2003				
CHICKEN				
	PRICES		VOLUME	
	(Cents per Pound)			

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

	PRICES		VOLUME	
	(Cents per Pound)			

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	22.00	13.50-18.00	204,000	-
WTD AVERAGE	22.00	16.88		
15-20%				
RANGE	19.00-21.50	13.00-15.00	1,652,400	1,101,600
WTD AVERAGE	20.69	13.90		
20% OR MORE				
RANGE	-	11.00	20,400	-
WTD AVERAGE		11.00		

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

14-NOV-2003				
CHICKEN				
	PRICES		VOLUME	
	(Cents per Pound)			

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

	PRICES		VOLUME	
	(Cents per Pound)			

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	14.00-22.00	17.50	1,016,000	676,000
WTD AVERAGE	17.97	17.50		
15-20%				
RANGE	22.00-30.00	11.00-15.00	2,302,000	960,000
WTD AVERAGE	28.48	12.03		
20% OR MORE				
RANGE	-	11.00	41,000	-
WTD AVERAGE		11.00		

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 14 NOVEMBER 2003.

The tom bulk parts trade sentiment on tom drums was mixed ranging from barely steady to fully steady, 2-joint wings steady at least steady, necks and full-cut wings steady to firm. Demand slow to moderate. Some processors moved parts supplies into ground turkey. Demand for ground turkey into retail channels fair to good as consumers looked for alternatives due to the high cost of ground beef. Tom bulk parts offerings mixed on drums, light on 2-joint wings and light at best on full-cut wings and necks. Trade sentiment on mechanically separated turkey (MST) and thigh meat was steady to weak. Trading centered on a moderate volume of fresh 4-8 lb. breasts for domestic shipments, balance light to fair. For domestic: tails 25, tom defatted gizzards 63, fresh wing meat 74, fresh scapula 92, plant grade basted 20-22 lb. breasts 115 cents delivered. Frozen -20% -60 days age MST traded at 12-16.50 cents delivered domestic and export and fresh tom drums at 42 cents delivered export.

FRIDAY, NOVEMBER 14, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	40.00-43.00		41.50	160	42.24	680
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS						
MECHANICALLY SEPARATED 2/		W	19.75	208	18.36	364
THIGH MEAT - FROZEN	90.00-91.00		90.67	120	90.50	264

THURSDAY, NOVEMBER 13, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	43.00-44.00		43.67	120
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECHANICALLY SEPARATED 2/		W	19.75	208
THIGH MEAT - FROZEN	90.00		90.00	52

WEDNESDAY, NOVEMBER 12, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	40.00-43.00		41.25	320
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECHANICALLY SEPARATED 2/	17.50-22.00		19.75	208
THIGH MEAT - FROZEN	91.00		91.00	52

NO EXPORT TRADING REPORTED ON TUESDAY, NOVEMBER 11, 2003, DUE TO VETERANS DAY HOLIDAY.

MONDAY, NOVEMBER 10, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	45.00-46.00		45.50	80
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECHANICALLY SEPARATED 2/	16.50		16.50	156
THIGH MEAT - FROZEN	90.00		90.00	40

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.

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